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Germany

Citrus

Trade Data

2004

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Report Highlights:

Total German imports of fresh citrus fruit amounted to 1.099 million MT in MY 2003/2004 (Oct/Sept), of which 1.6 percent or 17,214 MT originated in the United States. Grapefruit accounted for almost all of the U.S. citrus exports to Germany. Spain is the biggest citrus supplier to the German market. For MY 2004/2005 German citrus imports are expected to increase to 1.17 million MT due to higher citrus availability from Mediterranean countries.

Includes PSD Changes: No
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Production

Germany does not produce fresh citrus fruit.

Consumption

Consumption of fresh citrus in Germany is met solely by imports. German citrus imports mainly depend on the size of the citrus crop and the export availability in Mediterranean countries, rather than on consumer demand.

Trade

Differences between volumes given below and other sources may be due to the fact that the customs data used in this report states volumes by country of origin, while the German Federal Office for Statistics notifies Eurostat by country of shipping. For example, U.S. grapefruit entering Germany via Rotterdam would be stated in this report as import from the U.S. but Eurostat would label it as import from the Netherlands.

Imports

Over 90 percent of German citrus imports originate from Mediterranean countries. In MY 2003/2004 (October/September), Spain was the largest supplier of fresh citrus fruit to Germany with a total market share of 77 percent. The market share for fresh tangerines, fresh oranges and fresh lemons, was 93 percent, 79 percent and 72 percent, respectively.

Only grapefruit and lemons are sourced in substantial amounts from countries outside the Mediterranean Sea area. In MY 2003/04, 61 percent of imported grapefruit originated from non-Mediterranean countries. The main suppliers were United States, South Africa, and Argentina with an import share of 26 percent, 11 percent, and 8 percent, respectively. Argentina supplied 16 percent of the imported lemons.

In general, U.S. exports of fresh citrus to Germany are marginal. In MY 2002/2003 (Oct/Sept) total U.S. citrus exports to Germany amounted to 17,214 MT, which represented merely 1.6 percent of total German citrus imports. However, the United States was the most important supplier of grapefruit in the German market with a 26 percent market share.

Total imports of all types of citrus amounted to 1.1 million MT in MY 2003/2004 (October/September). This is a 3 percent decrease compared to the previous MY, and largely a result of the reduced availability in Mediterranean countries and higher prices.

Fresh sweet oranges are the most popular citrus fruit in Germany, and made up 52 percent of all citrus German imports in MY 2003/04. Orange imports amounted to 573,256 MT, which was just marginally above the previous MY. 79 percent of the imported oranges originated in Spain. Other important suppliers of fresh oranges were Greece, Italy, South Africa, and Morocco. U.S. shipments of oranges totaled 298 MT, which was tenfold the previous year's volume but still a marginal amount. Interestingly enough, this increase occurred despite additional tariffs¹ on navel oranges imposed by the EU as retaliation in the WTO case concerning the U.S. foreign sales corporations (FSC.) It is our understanding that these tariffs will be abolished as of January 1, 2005. However, the additional tariff was compensated for by a lower average import price of \$570.99 per MT in MY 2003/04 compared to \$686.90 in MY 2002/03.

¹ The additional tariff amounted to 5 percent in March 2004, and increased by one percent each month since.

Imports of fresh tangerine-type citrus amounted to 325,929 MT in MY 2003/04, down 9 percent from the previous year. Spain clearly dominates the German market with an import share of 93 percent, followed by Morocco (1.6 percent), Argentina (1.2 percent), and Greece (1.1 percent). Tangerines accounted for 30 percent of total German citrus imports.

Imports of fresh lemons dropped by 5.8 percent to 120,487 MT in MY 2003/2004 compared to MY 2002/2003. Spain, Argentina, and Italy were the main suppliers of fresh lemons to Germany, with market shares of 72 percent, 16 percent, and 5 percent, respectively, in MY 2003/2004. Lemons comprised 11 percent of total German citrus imports. Germany did not import any lemons from the U.S. in MY 2002/03 or 2003/04.

In Germany, grapefruit is less popular compared to other citrus fruits. In MY 2003/2004 grapefruit comprised only 6 percent of total citrus imports. They amounted to 64,935 MT, a slight 0.4 percent below the previous marketing year's level. The United States was the largest grapefruit exporter to Germany with an import market share of 26 percent (16,911 MT), followed by Turkey (19 percent market share), Israel (12 percent), South Africa (11 percent), and Argentina (8 percent). U.S. grapefruits are present on the German market from mid-November through end of May. The main varieties imported from the U.S. are "*ruby red*" and "*flame ruby*", with some imports of *dark red*, *ruby star*, *flame star*, and *star ruby*.

Imports of orange juice (figures converted to 65 degrees Brix) totaled 333,623 MT in MY 2003/2004. This is an increase of 11 percent compared to the previous marketing year, with Brazil supplying approximately 53 percent or 177,285 MT of the market, followed by Switzerland with 67,232 MT and the Netherlands with 19,433 MT. The United States is a marginal supplier of orange juice, accounting for only 844 MT or less than 1 percent of the import volume in Germany. Orange juice is the second most popular juice (behind apple juice) in Germany and accounts for 24 percent of the domestic juice consumption.

Exports

All exports of fresh citrus from Germany are re-exports. Exports amounted to 4 percent of total citrus imports and totaled 44,479 MT in MY 2003/2004, 35 percent more than in the previous MY.

With orange juice, the situation is different. Substantial amounts of imported concentrated juice are processed into juice and exported thereafter mainly to other EU countries, especially the Netherlands, France, Belgium, and the United Kingdom. In MY 2003/2004 Germany exported 81,512 MT of orange juice (65 degrees Brix equivalent). That is about 24 percent of the import volume.

MY 2004/2005 Forecast

According to the German Central Market and Price Reporting Agency (ZMP), Mediterranean producers estimate an increase in exports in MY 2004/2005 of about 6 percent, from 5.864 million MT to 6.226 million MT. Exports of oranges are expected to remain stable at 2.8 million MT. For tangerines an increase of 12 percent to 2.19 million MT is projected, and lemon exports are expected to increase by 19 percent to 922,000 MT. Only grapefruit exports are expected to decrease, by 11 percent to 220,000 MT.

German domestic citrus consumption correlates to a large extent with Mediterranean citrus exports, therefore German imports are expected to increase to about 1.17 million MT.

The biggest disadvantage for U.S. citrus fruit on the German market used to be the unfavorable exchange rate, which made U.S. products very expensive compared to products from other origins. The weakening U.S. dollar could help increase prospects for U.S. citrus on the German market.

Note: In recent years the U.S. dollar/Euro exchange rate has been as follows:

2001:	US\$ 1	= Euro 1.1165
2002:	US\$ 1	= Euro 1.0575
2003:	US\$ 1	= Euro 0.8840

The current exchange rates (as of November 19, 2003, Handelsblatt) are for:

U.S. dollar/ Euro	US\$ 1	= Euro	0.7716
Euro/U.S. dollar	Euro 1	= U.S. dollar	1.2960

Statistical Tables

Table 1: German Imports and Exports of Fresh Oranges

German Imports of Fresh Oranges, in MT				
MY 2002/2003 (Oct/Sep)		MY 2003/2004 (Oct/Sep)		Import share (percent)
USA	25	USA	298	0.052
SPAIN	441,483	SPAIN	453,411	79.1
GREECE	34,850	GREECE	36,630	6.4
SOUTH AFRICA	30,193	ITALY	24,126	4.2
ITALY	23,574	SOUTH AFRICA	22,664	4.0
MOROCCO	18,012	MOROCCO	12,382	2.2
ARGENTINA	8,227	ARGENTINA	9,855	1.7
ZIMBABWE	5,161	ZIMBABWE	6,149	1.1
TURKEY	2,822	URUGUAY	1,753	0.3
EGYPT	1,475	TURKEY	1,445	0.3
FRANCE	824	EGYPT	1,330	0.2
OTHER	2,709	OTHER	3,212	0.6
TOTAL	569,355	TOTAL	573,256	100.0

German Exports of Fresh Oranges, in MT				
MY 2002/2003 (Oct/Sep)		MY 2003/2004 (Oct/Sep)		Export share (Percent)
USA	0	USA	0	0.0
NETHERLANDS	2,964	NETHERLANDS	7,414	32.7
AUSTRIA	2,635	AUSTRIA	2,925	12.9
FRANCE	2,014	FRANCE	2,608	11.5
POLAND	1,107	FINLAND	2,214	9.8
DENMARK	962	SPAIN	1,706	7.5
SPAIN	789	SWEDEN	1,326	5.8
ITALY	646	DENMARK	873	3.8
FINLAND	611	UNITED KINGDOM	825	3.6
BELGIUM	359	POLAND	684	3.0
SWEDEN	322	ITALY	555	2.4
Other	1,099	OTHER	1,546	6.8
TOTAL	13,506	TOTAL	22,676	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

Table 2: German Imports and Exports of Tangerines

German Imports of Fresh Tangerines, in MT				
MY 2002/2003		MY 2003/2004		Import share
(Oct/Sep)		(Oct/Sep)		(percent)
USA	57	USA	1	0.0
SPAIN	318,217	SPAIN	302,127	92.7
MOROCCO	9,265	MOROCCO	5,118	1.6
TURKEY	8,308	ARGENTINA	3,934	1.2
GREECE	7,085	GREECE	3,585	1.1
ITALY	5,877	TURKEY	3,224	1.0
CYPRUS	4,275	ITALY	2,975	0.9
FRANCE	2,579	CYPRUS	2,242	0.7
ARGENTINA	1,360	FRANCE	1,137	0.3
SOUTH AFRICA	720	URUGUAY	535	0.2
URUGUAY	413	SOUTH AFRICA	517	0.2
OTHER	551	OTHER	536	0.2
TOTAL	358,707	TOTAL	325,929	100.0

German Exports of Fresh Tangerines, in MT				
MY 2002/2003		MY 2003/2004		Export share
(Oct/Sep)		(Oct/Sep)		(Percent)
USA	0	USA	0	0.0
POLAND	1,507	AUSTRIA	2,415	28.0
AUSTRIA	1,413	FINLAND	1,942	22.5
FINLAND	1,288	FRANCE	822	9.5
SPAIN	1,062	NETHERLANDS	758	8.8
FRANCE	1,044	SWEDEN	675	7.8
NETHERLANDS	856	POLAND	605	7.0
DENMARK	424	SPAIN	426	4.9
BELGIUM	279	DENMARK	366	4.2
SWEDEN	267	CZECH REPUBLIC	257	3.0
ITALY	127	ITALY	102	1.2
OTHER	393	OTHER	261	3.0
TOTAL	8,660	TOTAL	8,628	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

Table 3: German Imports and Exports of Lemons

German Imports of Fresh Lemons, in MT				
MY 2002/2003		MY 2003/2004		Import share
(Oct/Sep)		(Oct/Sep)		(percent)
USA	0	USA	0	0.0
SPAIN	87,356	SPAIN	86,512	71.8
ARGENTINA	27,837	ARGENTINA	19,093	15.8
ITALY	4,657	ITALY	6,491	5.4
GREECE	2,741	TURKEY	2,521	2.1
SOUTH AFRICA	2,334	GREECE	1,903	1.6
CYPRUS	1,280	SOUTH AFRICA	1,601	1.3
TURKEY	911	CYPRUS	1,360	1.1
URUGUAY	502	MOROCCO	645	0.5
BRAZIL	105	URUGUAY	154	0.1
ZIMBABWE	83	BRAZIL	99	0.1
OTHER	157	OTHER	108	0.1
TOTAL	127,963	TOTAL	120,487	100.0

German Exports of Fresh Lemons, in MT				
MY 2002/2003		MY 2003/2004		Export share
(Oct/Sep)		(Oct/Sep)		(Percent)
USA	0	USA	0	0.0
AUSTRIA	1,677	AUSTRIA	1,416	28.5
DENMARK	521	DENMARK	586	11.8
NETHERLANDS	498	NETHERLANDS	477	9.6
FRANCE	476	ITALY	419	8.4
BELGIUM	460	SWEDEN	324	6.5
ITALY	387	FRANCE	322	6.5
FINLAND	147	FINLAND	322	6.5
GREECE	98	POLAND	303	6.1
RUSSIA	68	SPAIN	258	5.2
POLAND	51	CZECH REPUBLIC	257	5.2
OTHER	27	OTHER	281	5.7
TOTAL	4,410	TOTAL	4,964	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

Table 4: German Imports and Exports of Grapefruit

German Imports of Fresh Grapefruit, in MT				
MY 2002/2003		MY 2003/2004		Import share
(Oct/Sep)		(Oct/Sep)		(percent)
USA	18,595	USA	16,911	26.0
TURKEY	12,616	TURKEY	12,586	19.4
ISRAEL	6,975	ISRAEL	7,937	12.2
SOUTH AFRICA	6,964	SOUTH AFRICA	7,128	11.0
SPAIN	6,890	ARGENTINA	5,191	8.0
ARGENTINA	5,080	SPAIN	3,805	5.9
HONDURAS	1,745	HONDURAS	2,738	4.2
CYPRUS	1,663	MEXICO	2,516	3.9
BRAZIL	1,288	CUBA	1,273	2.0
MEXICO	950	BRAZIL	1,199	1.8
CUBA	638	CYPRUS	1,035	1.6
OTHER	1,764	OTHER	2,700	4.2
TOTAL	65,168	TOTAL	64,935	100.0

German Exports of Fresh Grapefruit, in MT				
MY 2002/2003		MY 2003/2004		Export share
(Oct/Sep)		(Oct/Sep)		(Percent)
USA	0	USA	0	0.0
POLAND	1,482	ITALY	1,229	29.1
ITALY	1,482	POLAND	866	20.5
NETHERLANDS	977	NETHERLANDS	668	15.8
FRANCE	461	AUSTRIA	351	8.3
AUSTRIA	356	FRANCE	332	7.9
DENMARK	253	SWEDEN	279	6.6
BELGIUM	142	CZECH REPUBLIC	160	3.8
GREECE	54	BELGIUM	111	2.6
SPAIN	37	DENMARK	106	2.5
SWEDEN	26	GREECE	33	0.8
OTHER	51	OTHER	83	2.0
TOTAL	5,321	TOTAL	4,218	100.0

Source: Data from the German Federal Office of Statistics, Wiesbaden

Table 5: German Imports and Exports of Orange Juice (converted to 65 brix basis)

German Imports of Orange Juice, in MT at 65 Brix				
MY 2002/2003 (Oct/Sep)		MY 2003/2004 (Oct/Sep)		Import share (percent)
USA	1,492	USA	844	0.3
BRAZIL	170,844	BRAZIL	177,285	53.1
SWITZERLAND	58,102	SWITZERLAND	67,232	20.2
POLAND	13,021	NETHERLANDS	19,433	5.8
NETHERLANDS	12,532	UNITED KINGDOM	14,447	4.3
ITALY	10,212	SPAIN	10,292	3.1
SPAIN	5,929	PORTUGAL	11,974	3.6
CZECH REPUBLIC	6,474	POLAND	9,198	2.8
CUBA	6,566	ITALY	9,645	2.9
COSTA RICA	2,392	CZECH REPUBLIC	3,936	1.2
UNITED KINGDOM	3,334	AUSTRIA	1,346	0.4
OTHER	9,726	OTHER	7,992	2.4
TOTAL	300,624	TOTAL	333,623	100.0

German Exports of Orange Juice, in MT at 65 Brix				
MY 2002/2003 (Oct/Sep)		MY 2003/2004 (Oct/Sep)		Export share (Percent)
USA	39	USA	34	0.0
NETHERLANDS	20,991	FRANCE	21,345	26.2
FRANCE	18,593	NETHERLANDS	19,522	23.9
BELGIUM	12,251	UNITED KINGDOM	12,168	14.9
UNITED KINGDOM	9,743	BELGIUM	10,633	13.0
DENMARK	2,052	DENMARK	4,125	5.1
SWEDEN	1,888	SWEDEN	2,439	3.0
ITALY	1,418	IRELAND	1,835	2.3
SPAIN	1,702	SPAIN	2,643	3.2
IRELAND	974	ITALY	1,693	2.1
AUSTRIA	823	GREECE	1,266	1.6
OTHER	2,730	OTHER	3,809	4.7
TOTAL	73,203	TOTAL	81,512	100.0

Note: All trade data for orange juice has been converted to 65 degrees brix. To convert to single strength (11.2 brix) multiply with 5.8.